

PERSI Executive Director Announces Retirement



PERSI Executive Director Alan Winkle used the April board meeting to announce his retirement. He will be leaving PERSI effective December 31, 2008. The Board accepted his letter of resignation and thanked him for all he's done for PERSI over the years.

In his letter to the Retirement Board, Alan expressed his pride in what PERSI has accomplished in the past two decades. Under his leadership, PERSI has grown from a \$1 billion system with \$2 billion in liabilities and 65,000 members in 1986, to one with more than \$11 billion in assets, \$10.5 billion in liabilities, and 118,000 members today. PERSI currently boasts a funded ratio of more than 100 percent and serves over 700 employers. Alan specifically acknowledged the quality and dedication of the staff and the ongoing support he's received from the Board over the years as contributing factors to PERSI's growth and many achievements.

Alan's public service career spans 36 years; 22 of those years have been with PERSI. He became the Executive Director in 1988. Since then, PERSI has changed in many areas:

- Technology capabilities have expanded. The expansion includes upgrading the PERSI network and automating processes, adding imaging and automated workflow, implementing a new Voice-over IP phone system and call routing technology, and linking the field offices to headquarters with high-speed data lines.
- Customer service has been enhanced. One of Alan's primary goals throughout the years has been to improve and increase customer service to PERSI members and employers. By increasing the number of publications, improving the Web site, and introducing a call center, customer service

has improved. By developing an Online Guide for staff and another one for employers, PERSI is able to get accurate information to members and employers in a timely fashion. Because of its success, a number of other retirement systems have taken the Online Guide idea and applied it to their own systems.

- The introduction of the Choice Plan 401(k) in 2001 was a major accomplishment under Alan's leadership. The 401(k) program grew from a voluntary program with three state agencies to a \$300 million statewide program available to all PERSI members.
- Member education program has grown. First initiated as part of the Choice Plan 401(k) rollout, member education has gone from being outsourced to being conducted by two full-time PERSI trainers. The workshops have been updated several times to ensure members have an understanding of their PERSI benefits and are prepared for retirement. Plans to use video conferencing and webinars to extend the program's reach to members in more remote areas of the state are in development.

These changes and PERSI's growth and success are a direct result of Alan's vision and dedication.

Changes in leadership can be difficult. Alan's departure will leave a hole that will be hard to fill... both administratively and personally. It's rare to work with someone who's extremely respected and well liked both inside and outside the organization. Employers and members are invited to attend a board meeting any time this year to personally say good-bye to Alan.

The Board has retained executive search firm EFL Associates to conduct a search for Alan's replacement. The process is expected to take approximately 6 months.

ONE EMPLOYER'S ANSWER TO GETTING ADDRESS CHANGES

- Nampa School District finds a solution to reduce returned mail -

After reading May's *News To Use* newsletter, PERSI was contacted by Benefit Coordinator Jane Barker from the Nampa School District (NSD). She wanted to share how NSD had successfully solved the address change issue for their employees.

A few month's ago, the NSD IT Department established an email address called "Change My Address." This email address was exclusively for employees to use to update their personal information with various departments, including payroll, human resources, and benefits.

Each payday a Benefits Q&A is emailed to all employees. Jane includes a reminder each month about using the "Change My Address" email to update information in the system. According to Jane, "As soon as it's sent, I start receiving emails with address updates." Between 15 and 20 responses are received each month. Jane is then able to update her files, and share the changes with insurance companies and PERSI.

To accommodate employees who don't have email access, NSD allows employees to give the updated information to the receptionist (or others with email) to submit, first making sure their name and address information is accurate before the third party submits the email. Jane notes, "Once we had the program set up and saw how well it worked, we only wished we'd thought of it earlier."

PERSI thought it was worthwhile to share the NSD success with other employers. You might consider talking to your own IT Department to see if something like this would work for you. In the meantime, please keep reminding your employees to let you know when they have an address change.

If you are interested in talking with Jane about the NSD program, you may contact her at (208) 469-4601 ext. 1054 or by email at jbarker@nsd131.org.

WRONG SOCIAL SECURITY NUMBERS CREATE PROBLEMS

There has recently been a rash of erroneous Social Security Numbers (SSN) for new employees on transmittals, so it's time to remind employers to check the accuracy of transmittals before submitting them.

An employer's first transmittal with a new employee will process fine; but when the employer changes an incorrect SSN on a subsequent transmittal, the transmittal will be rejected because the originally reported SSN is missing. The rejection will require a SSN audit by PERSI to correct the member's record. Not only is this time consuming, but it also causes delays in transmittal processing and creates the potential for errors. Reporting an incorrect SSN can also affect Choice Plan contributions, FICA, and W-2s, etc.

When you discover you've reported an incorrect SSN, please call the Employer Service Center (866-887-9525 or 208-287-9525) before submitting your next transmittal. If we don't have a copy of the member's SSN card on file, you will be asked to send one to us by mail, fax, or email. Once we have proof of the correct SSN, the member's record will be updated. You will be able to send in your transmittal with the correct SSN, and our system will not reject your report for "missing members."

Employers are encouraged to double check SSNs before submitting new employee information. Our goal is to make this type of mistake less prevalent than it is today. Please help us make this kind of error an occasional occurrence.

Notes

PERSI Deputy Director [Don Drum](#) attended the Pension Research Council Symposium on the future of Public Employee Retirement Systems; the National Council on Teachers Retirement Conference, where the focus was on succession planning, staff development and other human resource issues, contact center operations, and technology projects; and the CEM Benchmarking World Pension Administration Peer Conference, where the focus was on administrative practices for pension systems.